Process	*Purchase Order Chartfield Approval*
Process Number	*PO – 011* *Previously Revised 3/19/99, Latest Revision 8/15/00*

Description of Process

This process describes the review and approval of Purchase Order chartfields for agencies using the PeopleSoft approval process.

Input to Process

PO's in a "Pending Approval" status.

Output of Process

Approved or Denied or Recycled Purchase Orders. Denied and Recycled PO's remain in a "Pending Approval" status.

Service Level Agreement Required? (if yes, provide a brief description)

PeopleSoft Panel Groups being Used

Function	Panel Group
PO Chartfield Approval	PO Chartfield Approval
Maintain Chartfields	Maintain Distributions

Business Process Description

Process Description	Responsibility (Agency/Centralized)
Step 1: Navigate to the Manage Purchase Orders menu (Go, Administer Procurement, Manage Purchase Orders).	Agency Approver
Step 2: Displays the list of Purchase Orders in "Pending Approval" status (Use, Chartfield Approval, Approval). In the dialog box displayed, enter the "Origin" code for which approver has authority, or leave this field blank if authorized to approve for multiple origins. Click OK. A list of PO's requiring Chartfield Approval displays. Review the list displayed and select PO's for approval.	Agency Approver
Step 3: Review chartfield data displayed on the "Approval" panel. Go to the "Details" panel to review further PO details.	Agency Approver
Step 4: On the "Details" panel, click on the "magnifying glass" button to display line descriptions, quantities and amounts. Review the data.	Agency Approver
Step 5: Return to the "Approval" panel and select an "Approval Action" of "Approve", "Deny" or "Recycle". If denied or recycled (see option below for recycle status), key a reason in the "comment" field detailing the proper chartfields to be charged. If comments are entered, save the panel. Optionally, the approver can correct the chartfields before approving rather than selecting "Recycle" status. If using this option, skip to Step 7 (do not save panel). Note: Generally, "Deny" is used if the PO is to be canceled, and "Recycle" is used if the PO chartfield(s) need correcting.	Agency Approver
Step 6: Repeat the process for other PO's requiring chartfield approval. Go to Step 10.	Agency Approver
Step 7: Use the Red "X" to exit the chartfield approval panel without saving.	Agency Approver

Step 8: Navigate to the "Maintain Distributions" panel (Use, Maintain Distributions). In the dialog box, enter the Business Unit, PO Number, and the first PO line number to be reviewed, then click OK. Use the scroll bar to review the chartfields for each line item and make changes as necessary. After all changes are made, save the panel. Click the "Next in List" icon for the next PO line. Note: If the chartfield boxes are grayed out, this means the budget checking process has already run and the funds have been encumbered. If changes need to be made after the PO has been budget checked, a new distrib line will have to be entered to allow change of information. Place the cursor in the Quantity or Amount field, whichever is active, and click the "Insert Row" icon or the F7 key to insert a new distribution row. Enter the correct chartfield values. Scroll to the first chartfield and click the "CancelDist" button to cancel the distribution. Save the panel. If no changes are to be made, go to step 10.	Agency Approver
Step 9: If changes are made to the distrib line(s): The Agency Buyer navigates to the PO Header panel: (Go, Administer Procurement, Manage Purchase Orders), (Use, Purchase Orders, Header, Update/Display) Enter the Business Unit and PO ID in the dialog box, then click OK. Run the PO Edit process.	Agency Buyer
Step 10: Go to the Chartfield approval panel for the PO for which chartfields have been corrected, select "Approve" as the "Approval Action". Save the panel.	Agency Approver

Forms Used with Process (#)

**Attach sample form(s)

Process Flow Diagram (if appropriate):